

# Michelle O'Haren

Senior Retirement Strategies Group Consultant

**Pacific Life | Retirement Solutions Division**

Mobile: (949) 554- 9524

[Michelle.OHaren@PacificLife.com](mailto:Michelle.OHaren@PacificLife.com)

LinkedIn: [Michelle O'Haren](#)



Michelle O'Haren is a Senior Retirement Strategies Group Consultant with Pacific Life Insurance Company. Michelle brings more than 25 years of industry experience to her role, including experience in financial planning and wealth management. Her career began in the tax department of KPMG before she transitioned to running financial-planning groups for two major insurance companies. She also held advanced planning and education roles within a broker/dealer firm and financial services company.

## SOLUTIONS-BASED SERVICES

- Live or virtual educational programs:
  - Continuing education credits for state insurance CFP®, and PACE
  - Client seminars on Social Security, healthcare in retirement, retirement plan rollovers, women and investing, and other topics
- Live or virtual consultation services with:
  - Key advisors and teams on topics such as Social Security strategies, retirement income and beneficiary planning, and tax management
  - Centers of influence, including tax and legal professionals
- Strategy and technical support for sales opportunities

## EDUCATION AND SPECIALIZED TRAINING

- LLM, Taxation, Emory University
- JD, University of Notre Dame
- BBA, University of Notre Dame (Concentration in Accountancy)
- Certified Financial Planner (CFP®)
- Retirement Income Certified Professional (RICP®)
- Chartered Financial Consultant (ChFC®)
- Life and Variable Insurance—State of California
- Securities (FINRA)—Series 6, 7, and 24
- CPA License: Georgia

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